'84
NIELSEN
REPORT ON
TELEVISION

NIELSEN TELEVISION SERVICES

IN THE UNITED STATES . . .

Nielsen Television Index (NTI) provides continuing estimates of TV viewing and national sponsored network program audiences, including national ratings 52 weeks per year. Data regularly reported include persons audiences and household audiences by market sections, Daily Ratings, Fast National and Multi-Network Area Ratings, Cost/1000 Estimates and Program and Brand Cumulative Audiences. In addition, the National Audience Demographics Report provides estimates of audiences by persons categories within household demographics. NTI's on-line multiphase time-sharing computer systems offer clients direct access to a wide range of special analyses.

Nielsen Station Index (NSI) measures television station audiences in over 200 local markets, and provides season-to-season reports (up to seven per market per year), on viewing by time periods and programs. NSI measurements include metro area and Designated Market Area (DMA) ratings, station total audiences, program pre-emptions, cumulative audiences and "time viewed," and estimates of viewing over a wide range of demographic categories.

Nielsen Metered Market Service provides daily and weekly reports on television audiences in New York, Los Angeles, Chicago, San Francisco, Philadelphia, Detroit, Washington D.C. and Boston. Other markets such as Dallas-Ft. Worth are scheduled to have metered service in the near future.

Nielsen HomeVideo Index (NHI) provides measurement services for the cable television industry and related in-home video forms. This includes audience measurements for the cable satellite networks, local cable systems, pay-TV services and program suppliers.

IN CANADA . . .

Nielsen Broadcast Index (NBI) is the Canadian counterpart of the Nielsen Station Index in the United States. NBI measures television station audiences in the 42 DMA's that comprise the total Canadian national market. NBI report frequency varies from 6-18 weeks, depending on market size. Report book features include demographics, special vs. regular time period listings, trends, cumes, week-by-week ratings and metro area ratings for major reports.

Nielsen Television Index (NTI) publishes network television audience measurement reports for 37 weeks of the year. These reports cover all programs carried on Canadian networks: CBC, CTV, Global, Radio-Canada and TVA.

IN BELGIUM . . .

Diary measurement of national audiences is provided two months per year.

IN COLOMBIA . . .

Diary measurements of urban areas on a quarterly basis, plus optional monthly reports.

IN JAPAN . . .

Nielsen Station Index was established there in 1960, and produces Metered Market measurements for the Tokyo, Osaka and Nagoya areas and diary measurements for the 7 other markets.

Additional copies of this brochure are available at no charge within U.S.A., Canada, U.K., Ireland, Mexico and Japan upon request to A.C. Nielsen Company, Nielsen Plaza, Northbrook, Illinois 60062, U.S.A. and within Continental Europe, South Africa, Brazil, Australia and New Zealand from A.C. Nielsen Management Services S.A., P.O. Box 516, CH-6002 Lucerne, Switzerland.

The Nielsen data in this booklet are estimates of the audiences and other characteristics of television usage as derived from Nielsen Television Index and Nielsen Station Index measurements. The use of mathematical terms herein should not be regarded as a representation by Nielsen that such measurements are exact to precise mathematical values.

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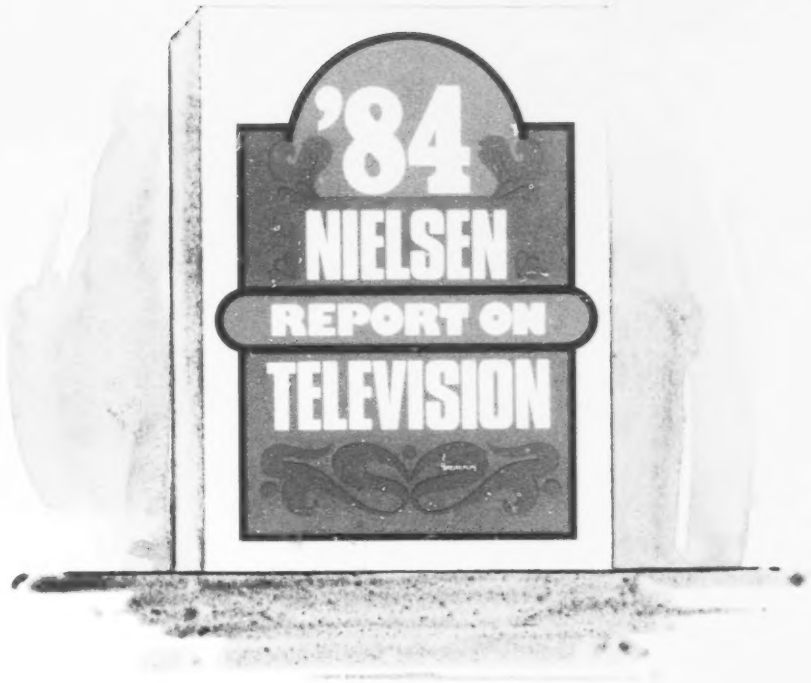


Nielsen Report on Television

The U.S. television and advertising industries have a relationship resulting in a vibrant and efficient communications medium.

Advertisers pay the bill and the viewers see the programs at little or no cost. The financial underwriting of programs by both small and large businesses has also become a factor in public broadcasting. Cable is benefiting also from the participation of advertisers.

Since 1950, Nielsen has been reporting on television's growth, its audiences and other characteristics which are of interest to all segments of the industry: advertisers, their agencies, TV stations, cable operators, networks and program producers.

Highlights from our many reports and special studies are contained in this, our 29th annual Nielsen Report on Television. I believe you'll find it as interesting as our previous editions.

James D. Lyons
President
Media Research Group

More viewing choices

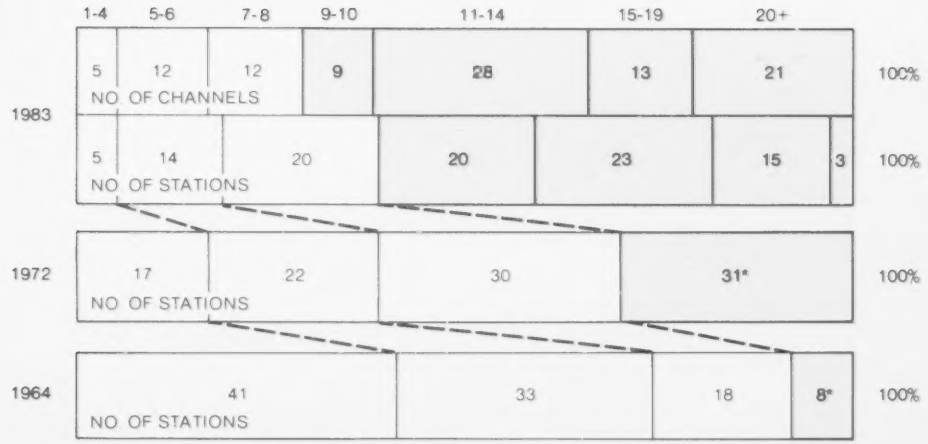
There are 1,152 television stations (869 commercial and 283 public) on the air as of January, 1984 according to the Federal Communications Commission. In addition, there are 8,123 cable head-ends in the U.S. as of February 1984, according to Nielsen Homevideo Index.

Nielsen Television Index reported, as of September, 1983, 61% of the U.S. Households could receive nine or more TV stations. In 1964, only 8% could receive that many stations.

Adding cable channels to the over-the-air station channels, the number of available viewing choices expands dramatically: 71% can receive 9 or more channels and 21% can receive 20+ channels.

STATIONS & CHANNELS RECEIVABLE PER HOUSEHOLD

% SHARE OF TV HOUSEHOLDS

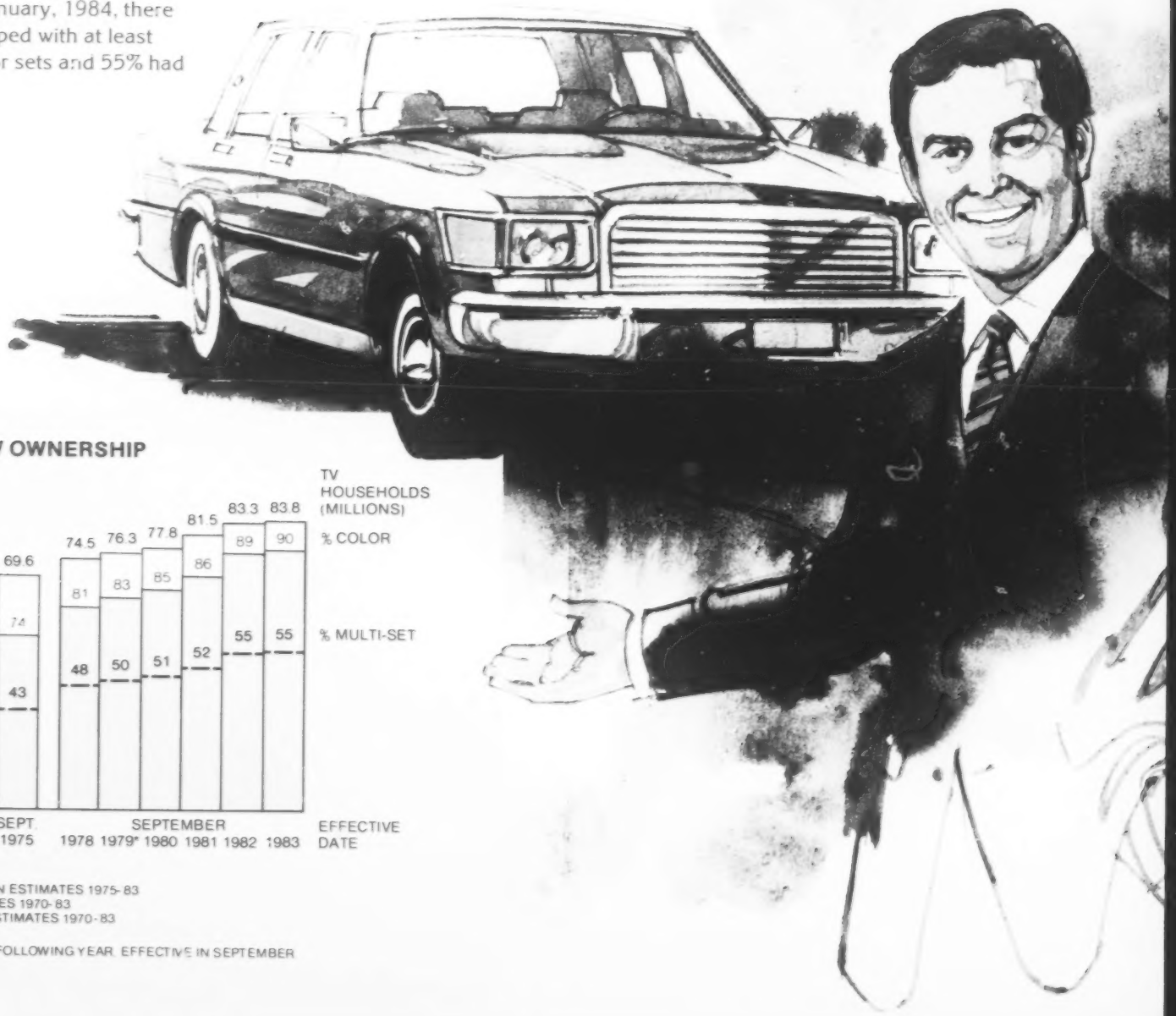


SOURCE: NTI SAMPLE
JULY 1964, 1972 SEPT. 1983

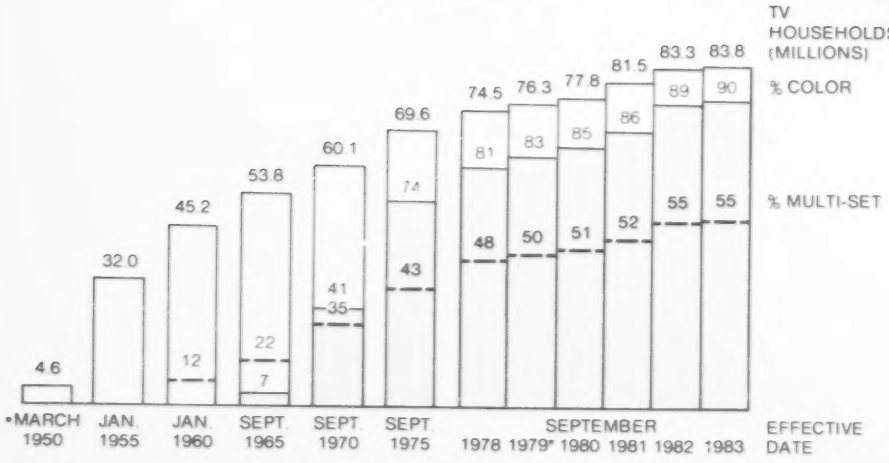
*9+ STATIONS

More TV households

The number of U.S. TV households keeps increasing every year. As of January, 1984, there were 83.8 million homes equipped with at least one set. Of these, 90% had color sets and 55% had two or more sets.



TV OWNERSHIP

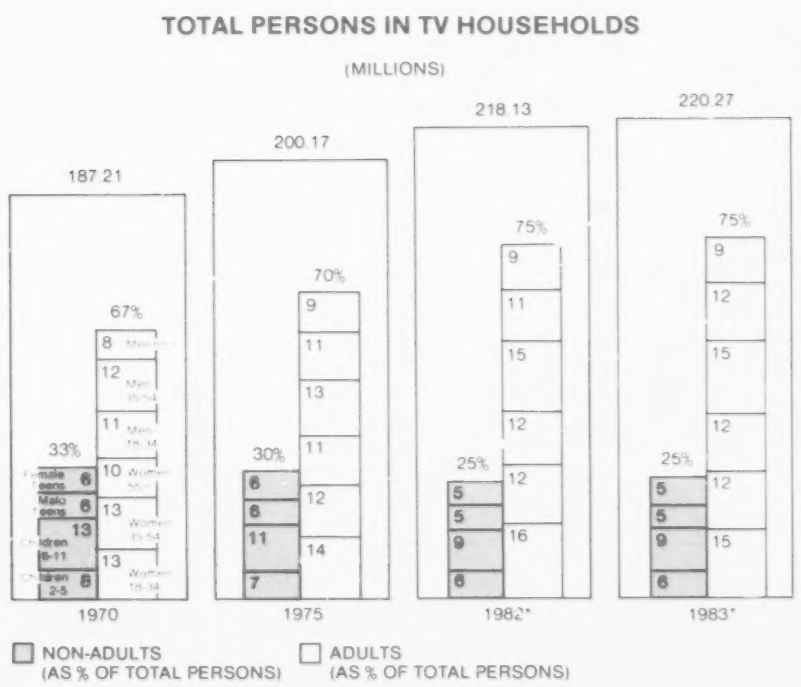


• TV OWNERSHIP U.S. CENSUS 1950-70 NIELSEN ESTIMATES 1975-83
COLOR: ARF CENSUS 1965, NIELSEN ESTIMATES 1970-83
MULTI-SET: U.S. CENSUS 1960-65, NIELSEN ESTIMATES 1970-83

* AS OF 1979, ESTIMATES BASED ON JAN. 1 OF FOLLOWING YEAR, EFFECTIVE IN SEPTEMBER

Adult and non-adult ratio stabilizing

The total number of people in TV households continues to rise, going over the 220-million mark this year. Of note, the gap between the percentage of non-adults and adults in TV households had been widening since 1970 but now seems to have stabilized in 1983. Even the age and sex groups, indicated within the bars, show little change from 1982 to 1983.



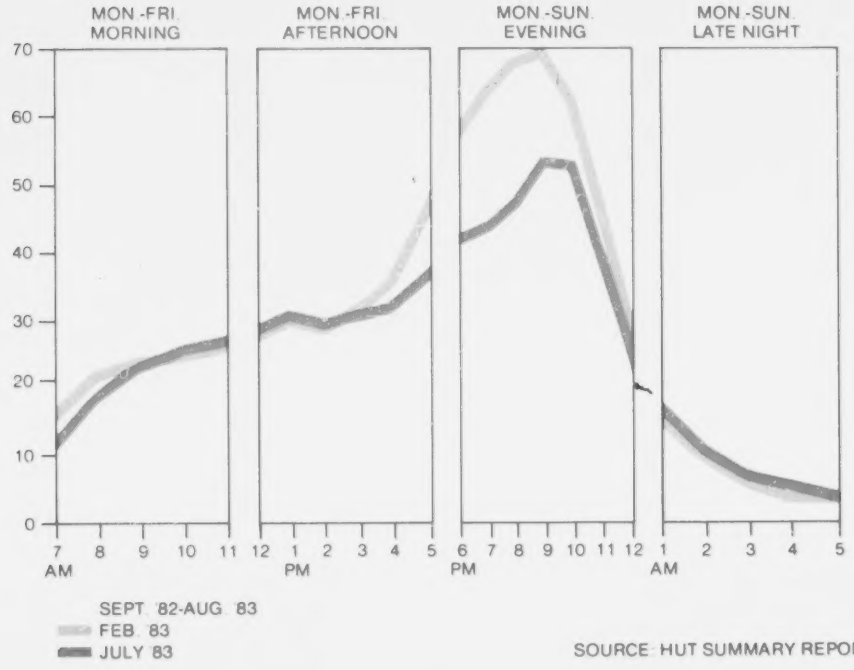
* BASED ON JAN. 1 OF THE FOLLOWING YEAR. OTHERS BASED ON SEPT. 1 EACH YEAR

Prime time and winter are peak viewing periods

TV viewing increases throughout the day, hitting a high between 8 and 10 pm. After that, the usage levels go down as people go to bed.

TV Usage can vary considerably from Winter to Summer. The greatest differences are during late afternoon and early evening, while the smallest differences are during early morning and late night.

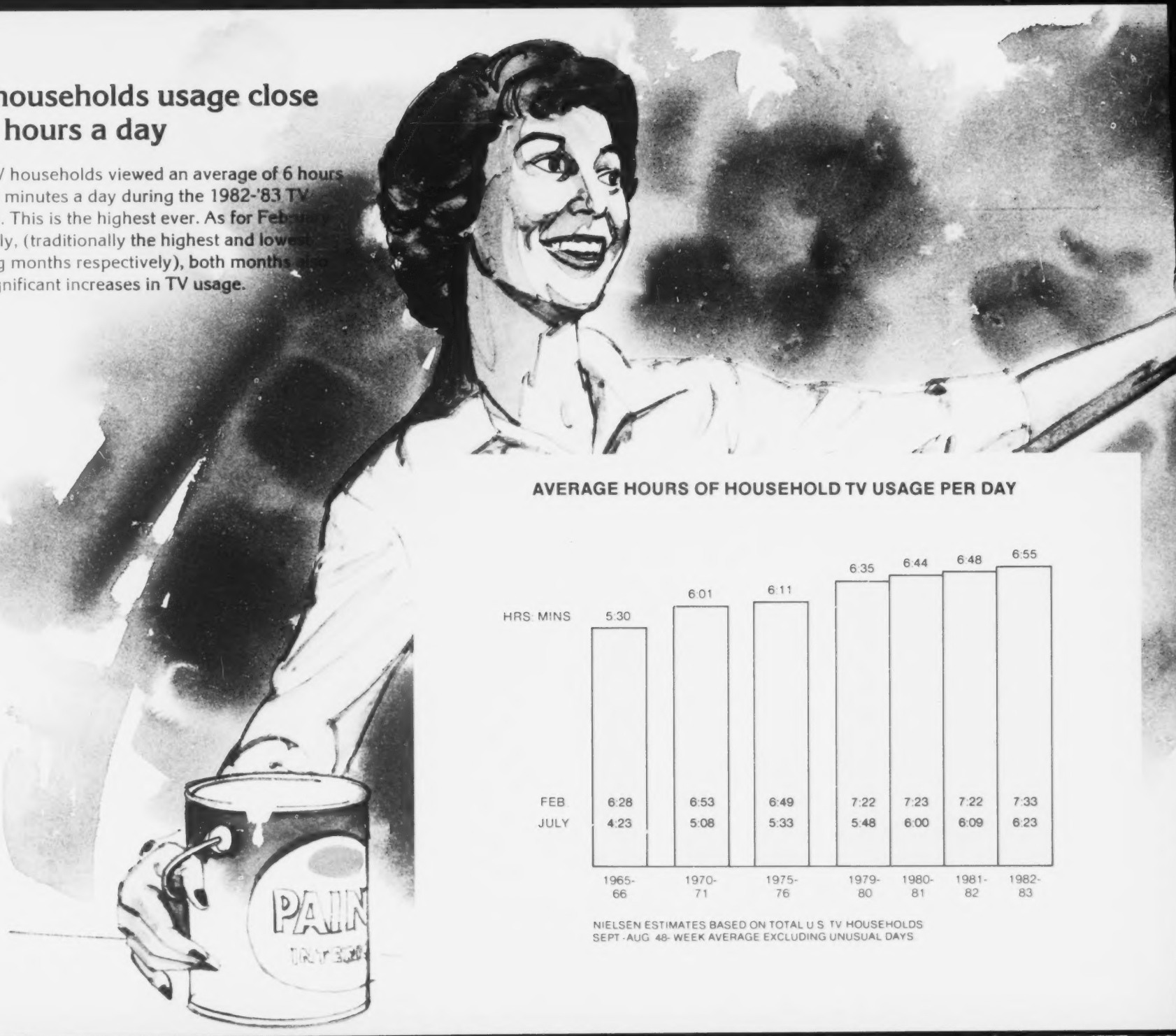
PERCENT OF HOUSEHOLD TV USAGE PER DAY



SOURCE: HUT SUMMARY REPORT

TV households usage close to 7 hours a day

U.S. TV households viewed an average of 6 hours and 55 minutes a day during the 1982-'83 TV season. This is the highest ever. As for February and July, (traditionally the highest and lowest viewing months respectively), both months also had significant increases in TV usage.



AVERAGE HOURS OF HOUSEHOLD TV USAGE PER DAY

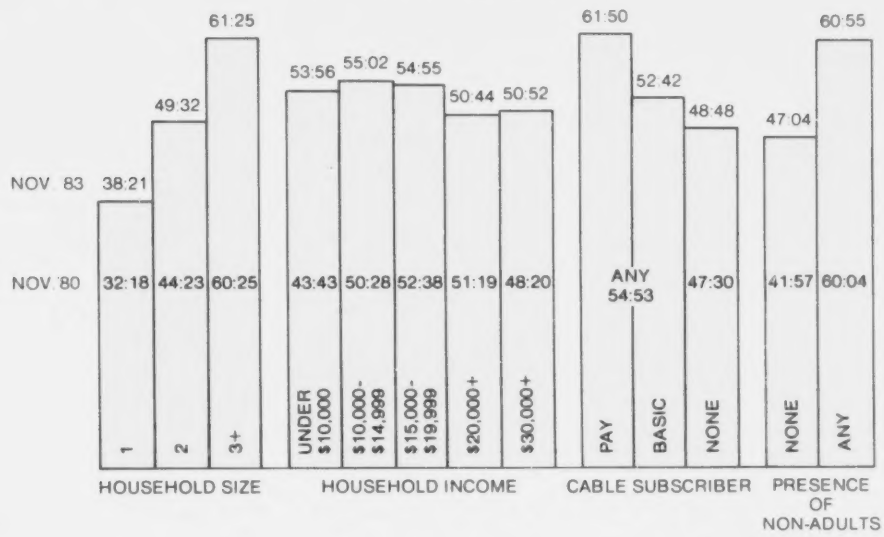
NIELSEN ESTIMATES BASED ON TOTAL U.S. TV HOUSEHOLDS
SEPT.-AUG. 48-WEEK AVERAGE EXCLUDING UNUSUAL DAYS

TV usage greatest in large households, pay cable households and households with non-adults

TV households viewed an average of 52-½ hours of television a week during November, 1983. Certain households, however, viewed at much greater levels. For instance, those with 3 or more people viewed almost 61-½ hours, pay cable households close to 62 hours and those homes with non-adults nearly 61 hours a week. Usage was relatively similar across the income classifications.

HOURS OF TV USAGE PER WEEK BY HOUSEHOLD CHARACTERISTICS

MONDAY-SUNDAY 24-HOUR TOTAL

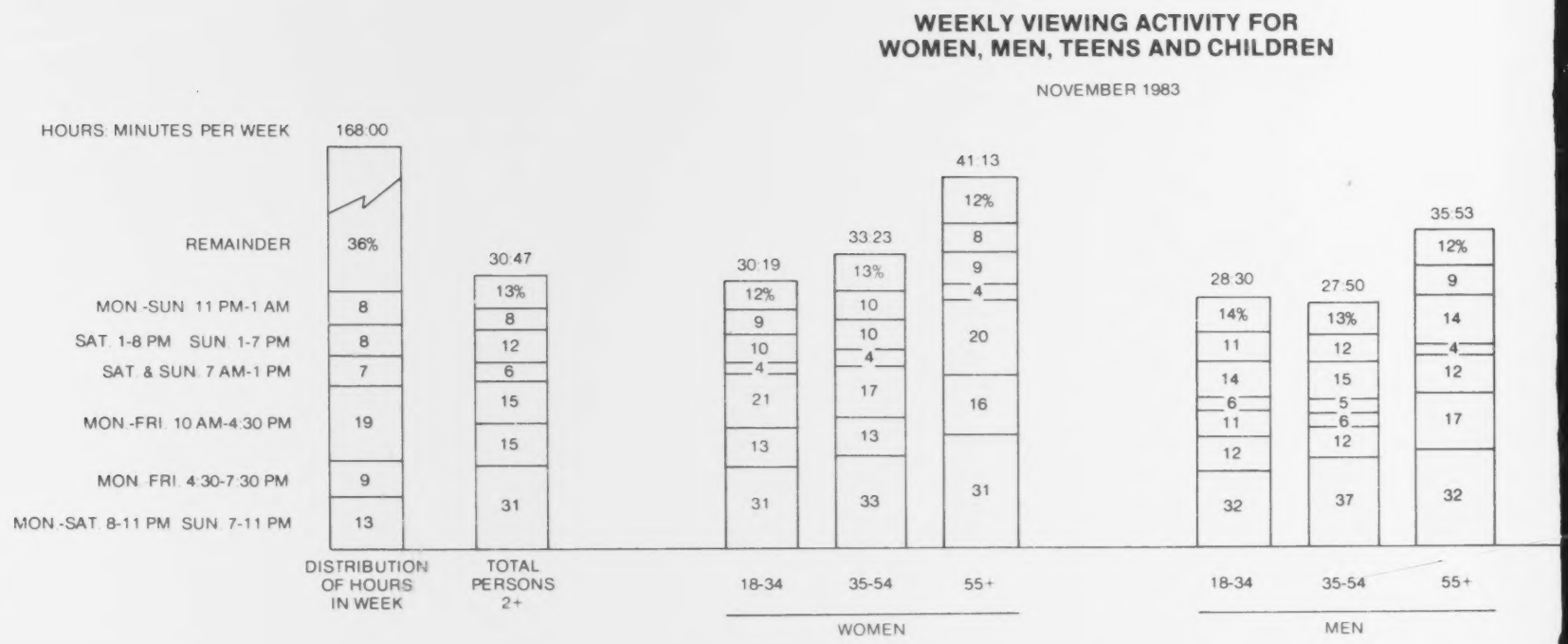


NIELSEN ESTIMATES NATIONAL AUDIENCE DEMOGRAPHICS REPORT

Older women view most: female teens least

For the most part, women view more TV than men; older men and women view more than younger adult age groups and younger children view more than older children and teenagers.

All of the age groups show an increase in viewing over a year ago.



NIELSEN ESTIMATES NATIONAL AUDIENCE DEMOGRAPHICS REPORT

24.16
9%
6
12
8
16
17
32
25.17
9%
6
14
9
11
17
34
24.50
12%
1
13
15
10
22
27
27.09
16%
1
10
14
22
19
18
FEMALE
MALE
6-11
2-5
TEENS
CHILDREN

NEW

8:30-9 PM time period and Sunday night still most popular viewing times

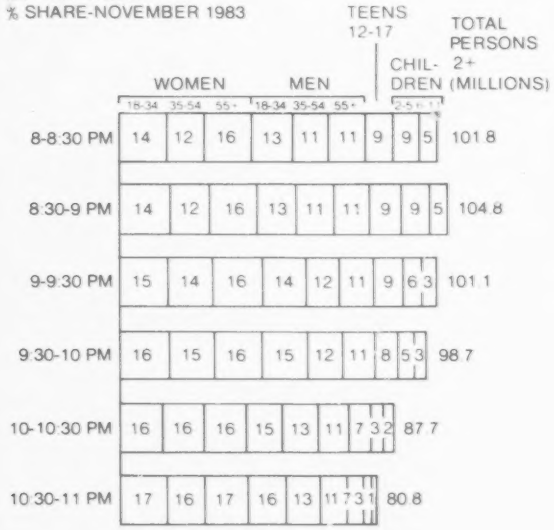
The 8:30 to 9:00 PM half-hour is the most viewed time. Women account for the greatest share of viewing during Prime Time.

Sunday evening continues to attract the greatest number of viewers during the week. Thursday, with a large increase in viewing, has moved into 2nd place, dropping Monday back to third in spite of the latter having a moderate increase in viewing.

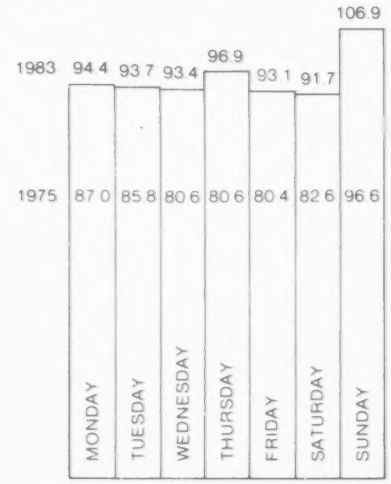
PERSONS VIEWING PRIME TIME

(AVERAGE MINUTE)

BY HALF HOUR
% SHARE-NOVEMBER 1983



BY NIGHT OF THE WEEK
TOTAL PERSONS 2+ MILLIONS
NOVEMBER



8-11 PM EASTERN TIME EXCEPT
SUNDAY 7-11 PM in 82, 7 30-10 30 PM
IN 75 EXCLUDING UNUSUAL DAYS

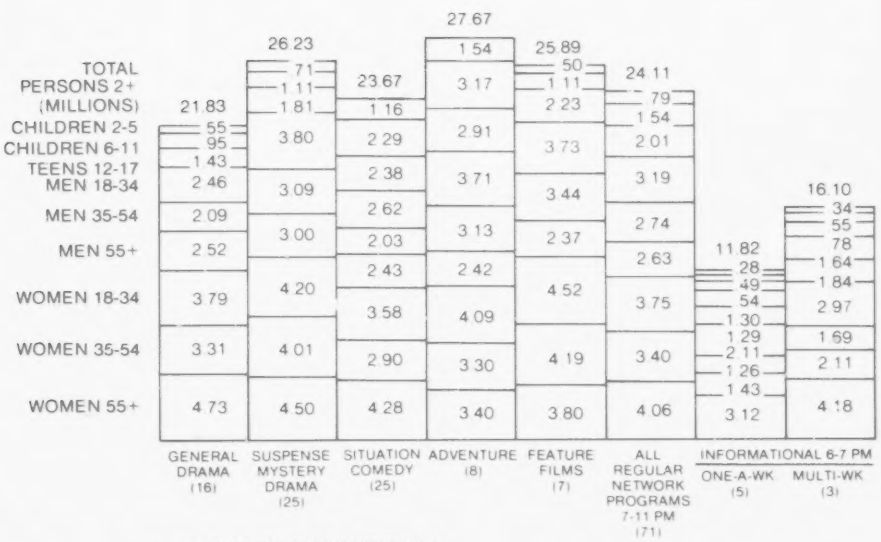
Adventure the most popular program type

Adventure programming attracted the largest Prime Time network audiences in November, 1983, moving up from last a year ago. Feature Film, last year's leader, fell to third while Suspense/Mystery Drama remained in 2nd.

Women 18-34 made up the largest segment for Adventure and Feature Films, and second largest for Suspense/Mystery Drama. Women 55+ made up the largest share of the audience for Suspense/Mystery Drama and General Drama.

AUDIENCE COMPOSITION BY SELECTED PROGRAM TYPE
REGULARLY SCHEDULED NETWORK PROGRAMS 6-11 PM

(AVERAGE MINUTE AUDIENCES)



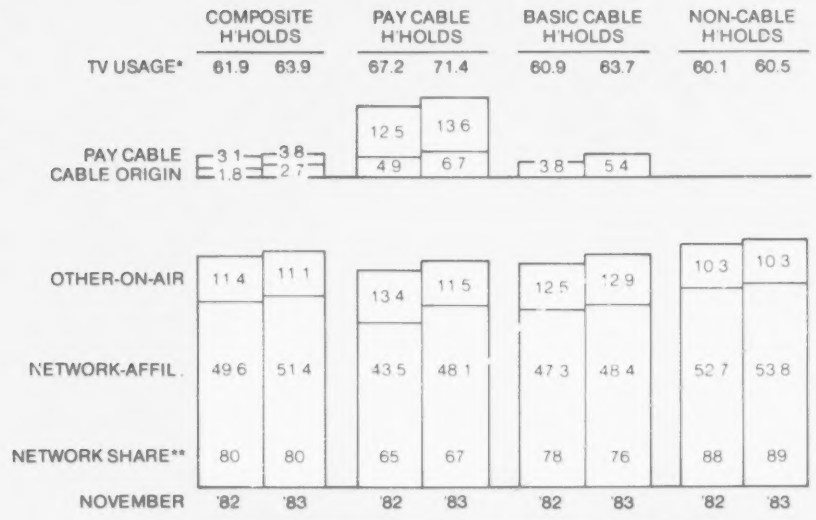
( ) NO. OF PGMS. NOVEMBER 1983

Pay cable households view more TV than basic cable or non-cable households

In general, households subscribing to pay cable services view more TV than non-cable or basic-cable households.

During Prime Time, the largest share of viewing (67%) for pay cable households, was still network offerings. Pay cable achieved a 13.6 rating, or a 19 share. In looking at a composite of all households, viewing to both cable and network programming went up from 1982 to 1983.

SOURCE OF HOUSEHOLD VIEWING—PRIME TIME (MON.-SUN. 8-11 PM)


COMPOSITE H'HOLDS
PAY CABLE H'HOLDS
BASIC CABLE H'HOLDS
NON-CABLE H'HOLDS
TV USAGE*
61.9 63.9 67.2 71.4 60.9 63.7 60.1 60.5
PAY CABLE
CABLE ORIGIN
3.1 3.8 1.8 2.7 12.5 13.6 4.9 6.7 3.8 5.4
OTHER-ON-AIR
11.4 11.1 13.4 11.5 12.5 12.9 10.3 10.3
NETWORK-AFFIL.
49.6 51.4 43.5 48.1 47.3 48.4 52.7 53.8
NETWORK SHARE**
80 80 65 67 78 76 88 89
NOVEMBER
'82 '83 '82 '83 '82 '83 '82 '83

* MAY BE LESS THAN SUM OF RECEPTION SOURCES BECAUSE OF SIMULTANEOUS VIEWING

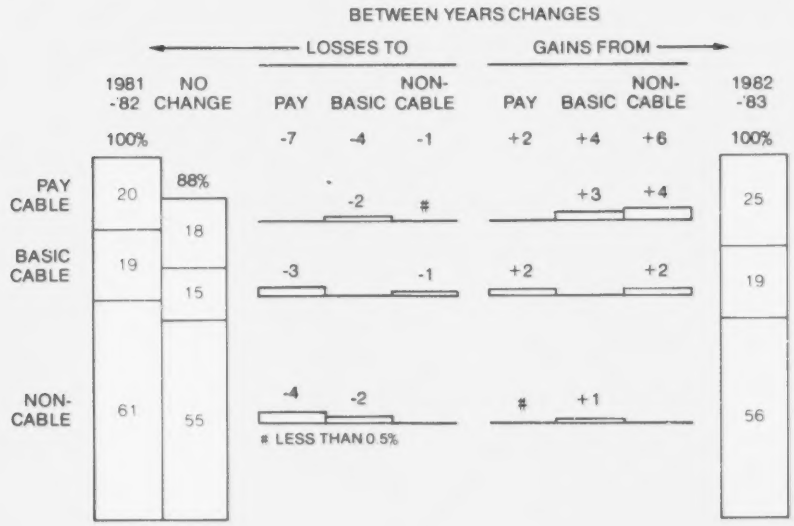
** NETWORK / % TV USAGE

Cable churn minimal

From the television seasons of 1981-'82 to 1982-'83, 88% of Nielsen national households retained the same cable status. These households also showed little change in their viewing patterns.

As for the remainder, 9% moved "up" a category, while 3% moved "down".

CABLE "CHURN"—1982-'83 VS. 1981-'82



SOURCE: CSR SAMPLE (AVERAGE OF NOV./FEB./MAY/JULY)

The 1984 political year

1984 is another presidential election year, and that will bring to television viewers a steady diet of political speeches, conventions and election returns.

On the average, 84% of U.S. TV Households are typically exposed to one of the quadrennial political conventions.

The number of hours of network coverage of the conventions has been declining since 1968. Viewing time has also decreased from a combined 17 hours and 21 minutes in 1968 to 10 hours and 18 minutes in 1980.

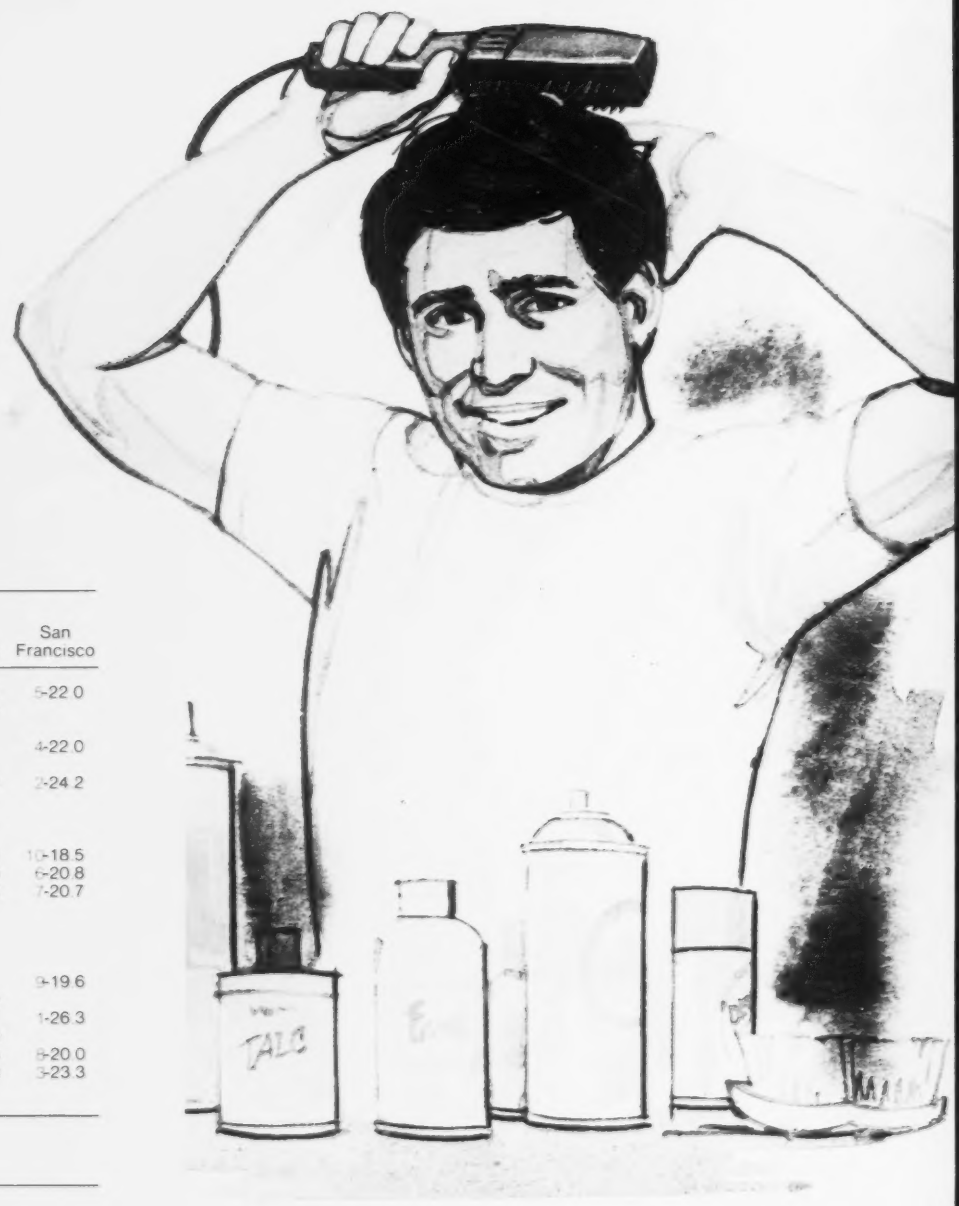
CONVENTION AUDIENCES

	DEMOCRATS				REPUBLICANS			
CONVENTION YEAR	1968	1972	1976	1980	1968	1972	1976	1980
% U.S. TV HOUSEHOLDS VIEWING SOME PART OF CONVENTION	89.7	86.1	88.5	81.5	83.5	81.1	87.9	77.4
CANDIDATE	HUMPHREY	MCGOVERN	CARTER	CARTER	NIXON	NIXON	FORD	REAGAN
AVERAGE HOURS: MINUTES VIEWED BY VIEWING HOUSEHOLDS	9:28	6:42	5:53	5:29	7:53	4:12	7:09	4:49
*NETWORK HOURS AIRED	39.1	36.7	30.4	24.1	34.0	19.8	29.5	22.7

* ONE OR MORE NETWORKS TELECASTING

Top ten programs have universal appeal. . . . . .almost.

The top ten nationally ranked prime evening programs in November, 1983 also showed up on one or more of the six largest markets where Nielsen has metered measurements of TV audiences. Each market, however, had its own distinctive list which included one or more programs not found on either the national or other major market lists.



TOP TEN PROGRAMS BASED ON NOVEMBER 1983 4 WEEK AVERAGE AS COMPUTED BY THE NSI ON-LINE TRACKING FACILITY

PRIME TIME PROGRAMS	Rank AA% U.S.*	New York	Chicago	L.A.	Philadelphia	Detroit	San Francisco
ABC Sunday Movie	2-28.3	1-27.5	1-34.2	4-24.1	1-30.0	1-35.0	5-22.0
A-Team	5-25.4	5-23.5		10-21.2		6-28.7	
CBS Monday Movie					6-23.8		
CBS NFL Football							4-22.0
Championship Boxing				9-21.4			
Chiefs-1 (spc)	7-25.1	6-23.3		1-25.9	4-24.9	10-25.5	2-24.2
Chiefs-2 (spc)		10-22.0		7-22.4			
Chiefs-3 (spc)	9-24.1			8-22.4			
Dallas	3-26.6		9-22.8				
Dynasty		7-23.3	4-25.5		7-23.0	7-27.1	10-18.5
Gambler, the (spc)	1-29.5		3-25.7	5-23.9		2-34.0	6-20.8
Greatest Practical Jokes (spc)	6-25.2	4-24.9	7-23.9			8-26.6	7-20.7
Hill Street Blues		8-23.1	5-25.0				
Hotel			10-22.7				
Life's Most Embarassing Moments (spc)					8-22.9		
Macy's Parade (spc)		3-25.3					
Monday Night Football							9-19.6
NBC Tuesday Movie	8-24.3		6-24.7		5-24.1	5-29.2	
Sixty Minutes	4-25.5	9-22.4		2-25.4	3-26.2		1-26.3
Thanksgiving Day Parade (spc)						9-25.9	
TV Bloopers (spc)	10-24.0		8-23.5	6-22.6	10-22.1	4-31.5	8-20.0
Viewpoint (spc)	SUST.	2-26.8	2-31.5	3-25.2	2-29.8	3-32.0	3-23.3
Webster					9-22.6		

* NATIONAL NIELSEN TELEVISION INDEX DATA FOR MATCHING NIELSEN STATION INDEX DATES OF NOVEMBER 3-30, 1983

Syndicated programs vary in rank by market

There are some 500 different syndicated, commercial programs scheduled at various times on both network affiliated and independent stations. Many of these programs were on network TV at one time, while others were made exclusively for local scheduling.

This list shows the top 20 programs ranked on their U.S. rating. This rating is the percentage of U.S. households viewing the program on an average basis as determined by Nielsen Station Index (NSI) individual market measurements. This list also shows how the ratings can vary by market. For example, within the Top 25 markets, Family Feud rated as high as 18% and as low as 5%.

Household Rank	Program	# Markets	NSI U.S. Rating	25 Market Range High	Low
1	Family Feud P.M.	135	12.3	18	5
2	Wheel Of Fortune	59	12.1	19	6
3	M.A.S.H.	172	11.2	18	1
4	Three's Company	141	10.3	15	1
5	PM Magazine	87	9.8	15	1
6	People's Court	166	9.1	15	3
7	Hee Haw	167	9.0	17	1
8	Entertainment Tonight	132	8.8	20	1
9	Jeffersons	121	8.3	16	1
10	Solid Gold	176	7.6	18	1
11	WKRP-In-Cincinnati	105	7.4	12	2
12	Dance Fever	110	7.3	20	1
13	Taxi	40	7.0	13	1
14	Barney Miller	127	6.6	14	2
15	Little House On Prairie	116	6.5	12	1
16	Love Boat	42	6.5	11	2
17	Tic-Tac Dough	83	6.4	17	2
18	Alice	83	6.1	10	1
19	Happy Days	125	6.1	12	2
20	Phil Donahue Show	165	6.0	9	2

PROGRAMS THAT CLEARED IN 20+ MARKETS
HOUSEHOLD RANK ADJUSTED ACCORDINGLY

NOVEMBER 1983

Top 15 network programs

Many different programs rank in network television's top 15 in the course of a year. Those shown here were the regular network programs that ranked at the top during Nielsen Television Index measurements, from October 24-November 20, 1983.

The size of a program's audience is but one of the number of ways to assess its worth or success. For example, many programs below the top 15 may be considered successful because they appeal to a specific target audience that network advertisers want to reach.

TOP 15 REGULARLY SCHEDULED NETWORK PROGRAMS

NOVEMBER 1983
Nielsen Average Audience Estimates
2 or More Telecasts
(15 Minutes or Longer)

TOTAL U.S. HOUSEHOLDS

Program Name	Average Audience %
ABC Sunday Night Movie	27.7
Dallas	26.3
60 Minutes	24.8
A Team	24.6
Simon & Simon	24.3
Falcon Crest	22.9
Magnum, P.I.	22.8
Dynasty	22.4
Hotel	20.8
Aftermash	20.7
Knots Landing	20.0
Newhart	19.6
Fall Guy	19.4
Love Boat	18.9
CBS NFL Football Game 1	18.9

N.B. INCLUDES DAY AFTER REG. EPISODE OF ABC SUN. MOVIE

MEN 18+

Program Name	Average Audience %
ABC Sunday Night Movie	25.8
A Team	19.3
60 Minutes	17.9
CBS NFL Football Game 1	16.6
NFL Monday Night Football	16.0
Magnum, P.I.	15.8
Simon & Simon	15.6
Hill Street Blues	14.3
NFL Football Game 2-NBC	14.2
Hardcastle & McCormick	13.9
Dallas	13.9
CBS NFL Football Game 2	13.9
Fall Guy	12.3
Dynasty	12.2
Aftermash	12.2

WOMEN 18+

Program Name	Average Audience %
Dallas	23.6
ABC Sunday Night Movie	21.0
Dynasty	20.1
Falcon Crest	20.0
Simon & Simon	19.4
60 Minutes	18.7
Magnum, P.I.	18.6
Knots Landing	18.0
Hotel	17.5
Aftermash	16.2
A Team	16.1
Love Boat	15.7
Newhart	15.7
NBC Monday Night Movies	15.6
Scarecrow & Mrs. King	14.9

TEENS 12-17

Program Name	Average Audience %
A Team	21.0
ABC Sunday Night Movie	19.9
Facts of Life	19.8
Happy Days	18.0
Just Our Luck	17.1
Knight Rider	15.9
Family Ties	15.7
Ripley's Believe It or Not	14.7
Three's Company	14.7
Fall Guy	14.5
Aftermash	13.8
Movie Week-Friday	13.7
Hardcastle & McCormick	13.4
That's Incredible	12.9
Smurfs III	12.6
Magnum, P.I.	12.6

CHILDREN 2-11

Program Name	Average Audience %
Dukes of Hazzard	27.2
A Team	25.0
Smurfs III	22.9
Smurfs II	22.7
Mr. T	22.2
Alvin & The Chipmunks	20.0
Knight Rider	19.7
Different Strokes	17.9
Silver Spoons	16.8
Rubik, The Amazing Cube	16.7
Smurfs I	16.6
Dungeons & Dragons	15.4
Saturday Supercade	15.2
Gimme A Break	15.2
Littles	14.8

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